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S2	18	PORTFOLIO (S) INFLATION (S) RETURN (S) RETIREMENT (S) DIS- TRIBUTION
S3	16	RD S2 (unique items)
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reviewed key word paragraphs.

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USPT,PGPB,JPAB,EPAB	retirement same withdrwal same account same (rate or periodic or annucal or monthly)	0	<u>L1</u>
USPT,PGPB,JPAB,EPAB	retirement same (withdraw??? or disburdement or distribut???) same account same (rate or periodic or annucal or monthly)	7	<u>L2</u>
USPT,PGPB,JPAB,EPAB	(estimat\$ or project\$) near5((monthly or annual) adj5 (income or withdrawal or return))	12	<u>L3</u>
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USPT,PGPB,JPAB,EPAB	14 and monte carlo	0	<u>L5</u>
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Search Results - Record(s) 1 through 3 of 3 returned.☐ 1. Document ID: US 6336103 B1

L4: Entry 1 of 3

File: USPT

Jan 1, 2002

US-PAT-NO: 6336103

DOCUMENT-IDENTIFIER: US 6336103 B1

TITLE: Rapid method of analysis for correlation of asset return to future financial liabilities

DATE-ISSUED: January 1, 2002

INVENTOR-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY
Baker; Nardin L.	Shorewood	WI	53211	

US-CL-CURRENT: 705/36; 705/35

Full	Title	Citation	Front	Review	Classification	Date	Reference	Claims	KMC	Draw Desc	Image
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☐ 2. Document ID: US 5802500 A

L4: Entry 2 of 3

File: USPT

Sep 1, 1998

US-PAT-NO: 5802500

DOCUMENT-IDENTIFIER: US 5802500 A

TITLE: System and method for computing a financial projection of a prefunding program for other postretirement employee benefits under FASB statement 106

DATE-ISSUED: September 1, 1998

INVENTOR-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY
Ryan; Raymond B.	Darien	CT		
Gans; Noah F.	New York	NY		

US-CL-CURRENT: 705/36; 705/1, 705/10, 705/31, 705/4

Full	Title	Citation	Front	Review	Classification	Date	Reference	Claims	KMC	Draw Desc	Image
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☐ 3. Document ID: US 5708260 A

L4: Entry 3 of 3

File: USPT

Jan 13, 1998

US-PAT-NO: 5708260

DOCUMENT-IDENTIFIER: US 5708260 A

TITLE: Slide-rule calculator for computing a salary replacement value

DATE-ISSUED: January 13, 1998

INVENTOR-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY
Maier; Steven F.	Chapel Hill	NC		
Johnson; Forrest B.	Durham	NC		
Lewis; Barbara J.	Durham	NC		

US-CL-CURRENT: 235/70R; 235/70A, 235/89R

Full	Title	Citation	Front	Review	Classification	Date	Reference
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KIMC	Draw. Desc	Image
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Term	Documents
INFLATION.EPAB,JPAB,USPT,PGPB.	33862
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Search Results - Record(s) 1 through 8 of 8 returned.☐ 1. Document ID: US 6321212 B1

L6: Entry 1 of 8

File: USPT

Nov 20, 2001

US-PAT-NO: 6321212

DOCUMENT-IDENTIFIER: US 6321212 B1

TITLE: Financial products having a demand-based, adjustable return, and trading exchange therefor

DATE-ISSUED: November 20, 2001

INVENTOR-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY
Lange; Jeffrey	New York	NY		

US-CL-CURRENT: 705/37; 705/1, 705/35, 705/36, 705/38

Full	Title	Citation	Front	Review	Classification	Date	Reference
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KWIC	Draw Desc	Image
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☐ 2. Document ID: US 6275814 B1

L6: Entry 2 of 8

File: USPT

Aug 14, 2001

US-PAT-NO: 6275814

DOCUMENT-IDENTIFIER: US 6275814 B1

TITLE: Investment portfolio selection system and method

DATE-ISSUED: August 14, 2001

INVENTOR-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY
Giansante; Joseph E.	Mountain View	CA		
Dragun; Brian C.	El Granada	CA		

US-CL-CURRENT: 705/36; 705/35

Full	Title	Citation	Front	Review	Classification	Date	Reference
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KWIC	Draw Desc	Image
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☐ 3. Document ID: US 6240399 B1

L6: Entry 3 of 8

File: USPT

May 29, 2001

US-PAT-NO: 6240399

DOCUMENT-IDENTIFIER: US 6240399 B1

TITLE: System and method for optimizing investment location

DATE-ISSUED: May 29, 2001

INVENTOR-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY
Frank; Glenn	Burlington	MA	01803	
Whittaker; Jay	Wellesley Hills	MA	02481	
Keller; Robert	Harvard	MA	01451	

US-CL-CURRENT: 705/36

Full	Title	Citation	Front	Review	Classification	Date	Reference
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KWIC	Draw Desc	Image
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☐ 4. Document ID: US 6228664 B1

L6: Entry 4 of 8

File: USPT

May 8, 2001

US-PAT-NO: 6228664

DOCUMENT-IDENTIFIER: US 6228664 B1

TITLE: Calibration method for radiation spectroscopy

DATE-ISSUED: May 8, 2001

INVENTOR-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY
Bronson; Frazier	Middletown	CT		
Atrashkevich; Valerii V.	Moscow			RUX

US-CL-CURRENT: 438/14; 250/252.1, 250/308, 250/363.09, 702/8

Full	Title	Citation	Front	Review	Classification	Date	Reference
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KWIC	Draw Desc	Image
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☐ 5. Document ID: US 6219650 B1

L6: Entry 5 of 8

File: USPT

Apr 17, 2001

US-PAT-NO: 6219650

DOCUMENT-IDENTIFIER: US 6219650 B1

TITLE: Method of determining optimal asset allocation utilizing asset cash flow simulation

DATE-ISSUED: April 17, 2001

INVENTOR-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY
Friend; Edward H.	Washington	DC		
McCrary; Robert T.	Seattle	WA		

US-CL-CURRENT: 705/36

Full	Title	Citation	Front	Review	Classification	Date	Reference
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KIMC	Draw Desc	Image
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☐ 6. Document ID: US 6173276 B1

L6: Entry 6 of 8

File: USPT

Jan 9, 2001

US-PAT-NO: 6173276

DOCUMENT-IDENTIFIER: US 6173276 B1

TITLE: System and method for financial instrument modeling and valuation

DATE-ISSUED: January 9, 2001

INVENTOR-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY
Kant; Elaine	Austin	TX		
Randall; Curt	Austin	TX		

US-CL-CURRENT: 706/50; 706/925

Full	Title	Citation	Front	Review	Classification	Date	Reference
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KIMC	Draw Desc	Image
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☐ 7. Document ID: US 6055517 A

L6: Entry 7 of 8

File: USPT

Apr 25, 2000

US-PAT-NO: 6055517

DOCUMENT-IDENTIFIER: US 6055517 A

TITLE: Method of determining optimal asset allocation utilizing asset cash flow simulation

DATE-ISSUED: April 25, 2000

INVENTOR-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY
Friend; Edward H.	Washington	DC		
McCrory; Robert T.	Seattle	WA		

US-CL-CURRENT: 705/36

Full	Title	Citation	Front	Review	Classification	Date	Reference
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KIMC	Draw Desc	Image
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☐ 8. Document ID: US 5737581 A

L6: Entry 8 of 8

File: USPT

Apr 7, 1998

US-PAT-NO: 5737581

DOCUMENT-IDENTIFIER: US 5737581 A

TITLE: Quality system implementation simulator

DATE-ISSUED: April 7, 1998

INVENTOR-INFORMATION:

NAME	CITY	STATE	ZIP CODE	COUNTRY
Keane; John A.	Princeton	NJ	08540	

US-CL-CURRENT: 703/6; 700/104, 700/109, 700/95, 705/10, 706/11, 706/45, 706/46,
706/920

Full	Title	Citation	Front	Review	Classification	Date	Reference
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KMC	Draw Desc	Image
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MONTE.EPAB,JPAB,USPT,PGPB.	7211
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CARLO.EPAB,JPAB,USPT,PGPB.	9876
CARLOES	0
CARLOS.EPAB,JPAB,USPT,PGPB.	10199
CARLOE	0
INVESTMENT.EPAB,JPAB,USPT,PGPB.	29972
INVESTMENTS.EPAB,JPAB,USPT,PGPB.	6036
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